



Land and land investment governance

The Land Matrix's evolution from a global database to open governance

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Agrifirme
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A dual objective

Methodological / conceptual: From a database to instrument of inclusive governance



Results: Understanding / transparency re land deals



PHASE 1 – A GLOBAL DATABASE PROMOTING...

- Open data: Making the data visible and understandable
- Transparency in decision-making over land and investment, as a step towards greater accountability

Launched in April 2012



A global database...

* Land deals in the database - criteria

- Entail a transfer sale, lease or concession (often change of tenure)
- Initiated since 2000
- 200 hectares or more
- Change of use (extensive or ecosystem service provision to commercial use)

For **agricultural** production, timber extraction, carbon trading, mineral extraction, industry, renewable energy production, conservation, and tourism

* Information on investor (origin, type), deal (production intention, size), target region (former land use), & attempt to capture dynamics (Negotiation status, Implementation status)

* Sourcing:

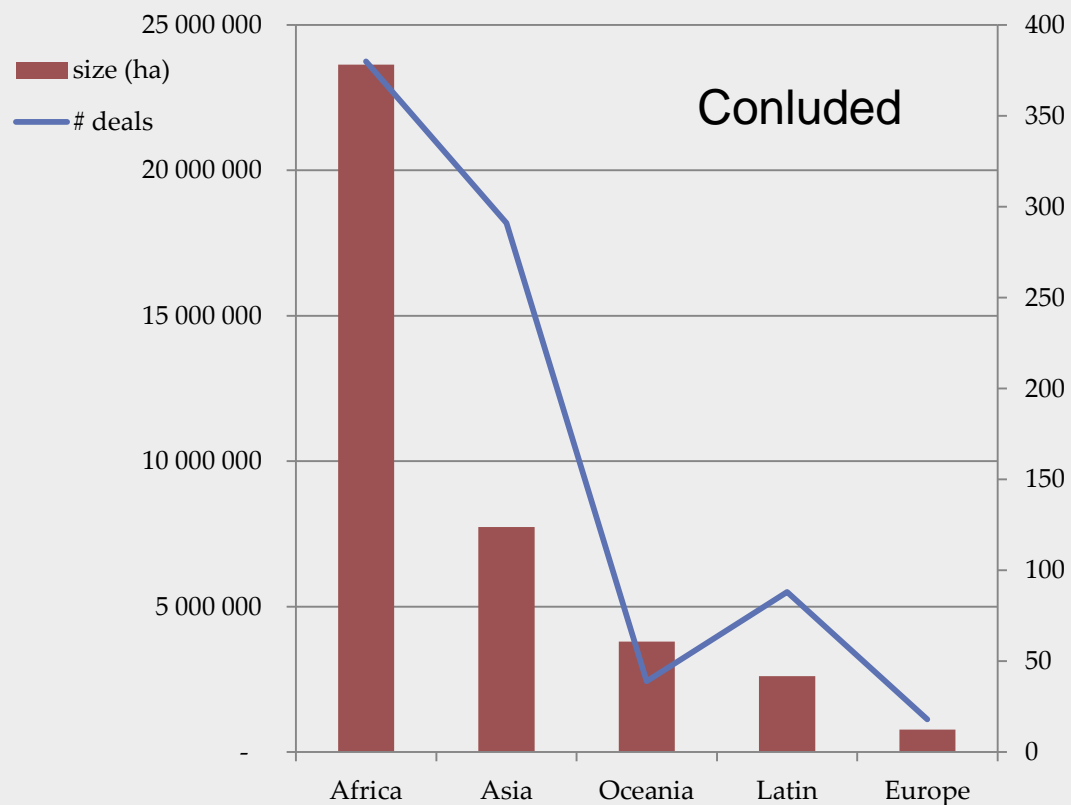
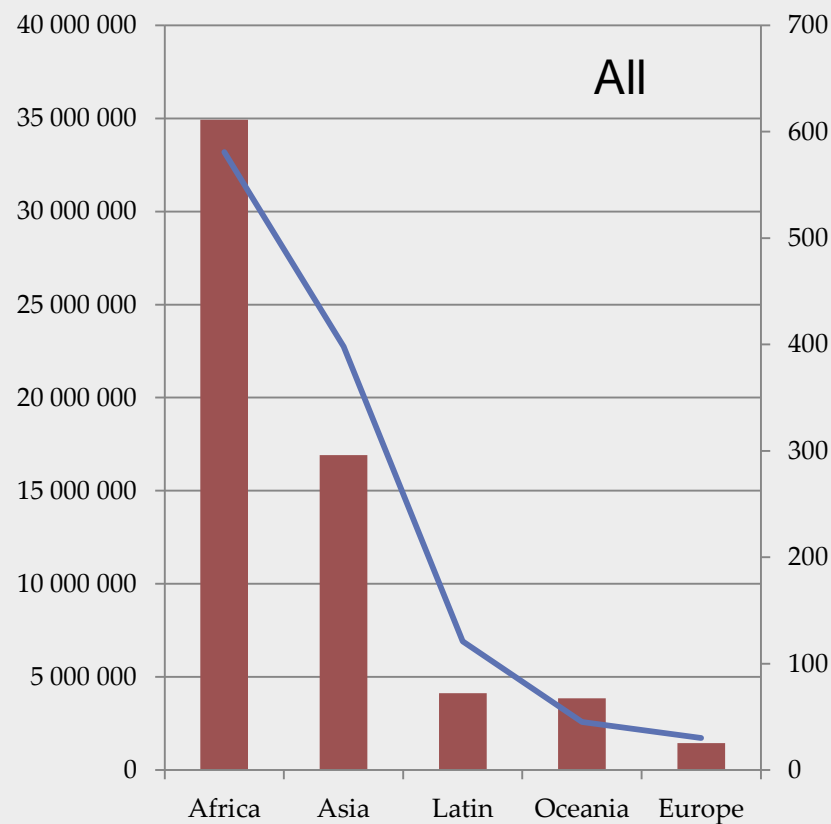
- Data entry/checking through LM partners/networks based on research/policy reports, official government records, company websites, media reports and personal information
- Crowd sourcing



Land deals globally

	# deals	ha intended	ha under contract
Oral agreement	66	3.7	1.1
Contract signed	804	50.8	30.6
concluded deals	870	54.5	31.8
Expression of interest	42	5.5	n.a.
Under negotiation	144	9.1	n.a.
Intended deals	186	14.6	n.a.
Negotiations failed	50	5.3	n.a.
Contract cancelled	24	1.6	1.5
Failed deals	74	6.9	1.5

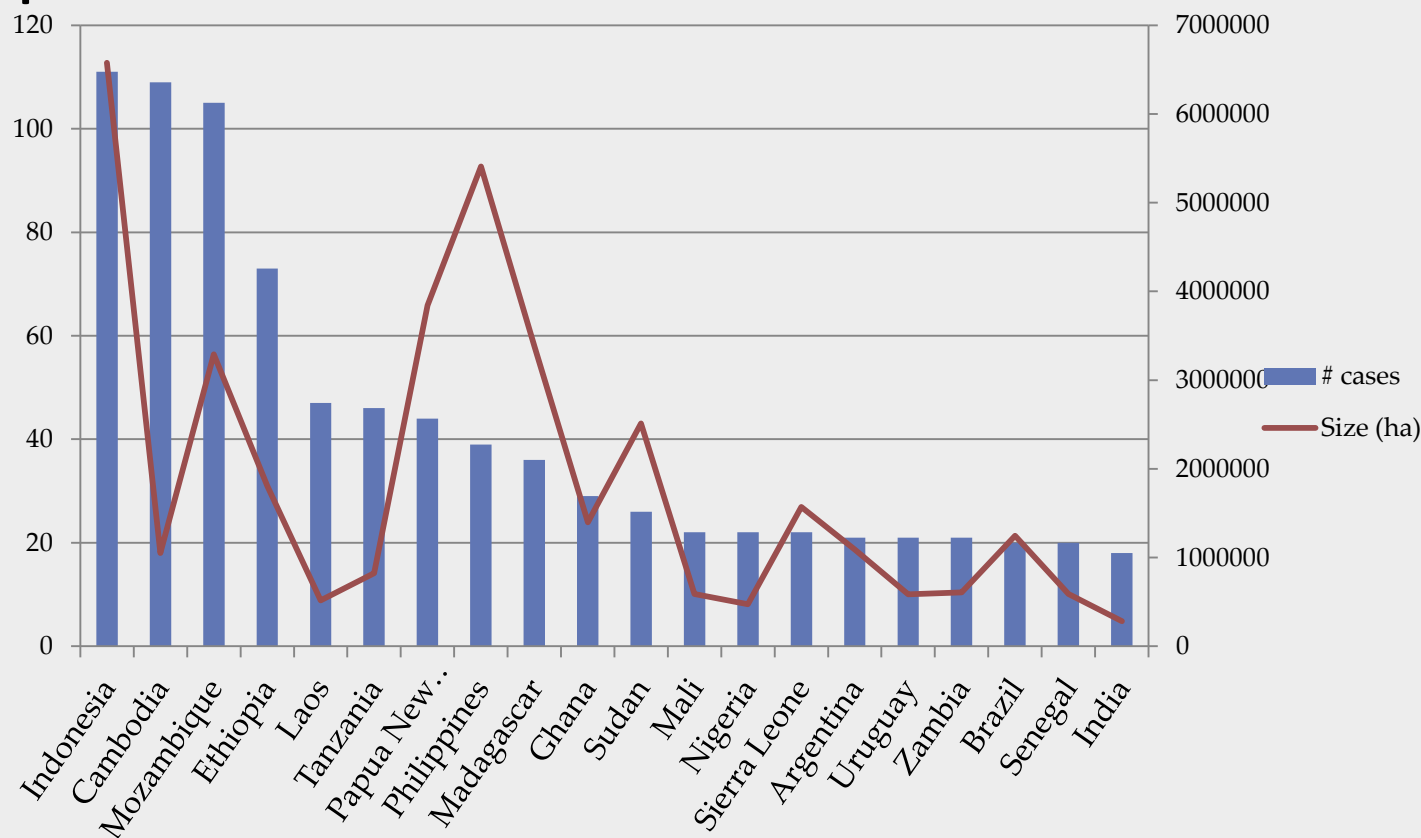
African countries are the most affected in the world





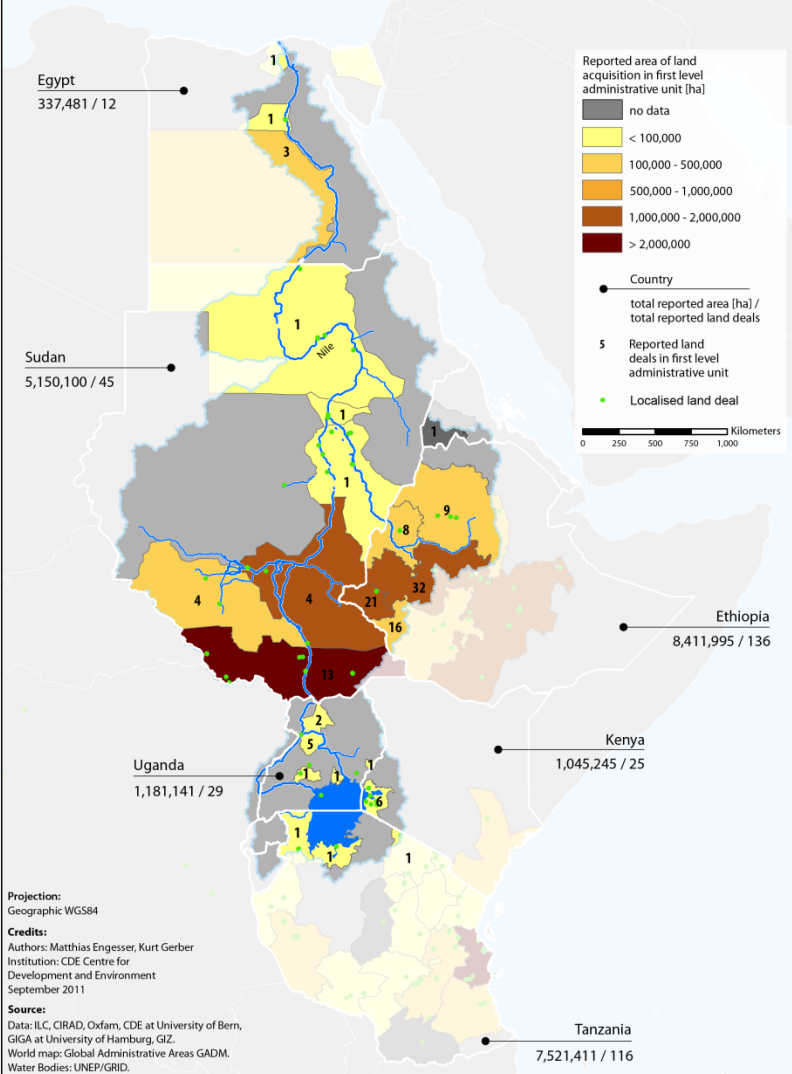
An important concentration per country ...

- Important concentration – top 20 countries, 74% deals, 80% size
- Top 20 – 9 African countries

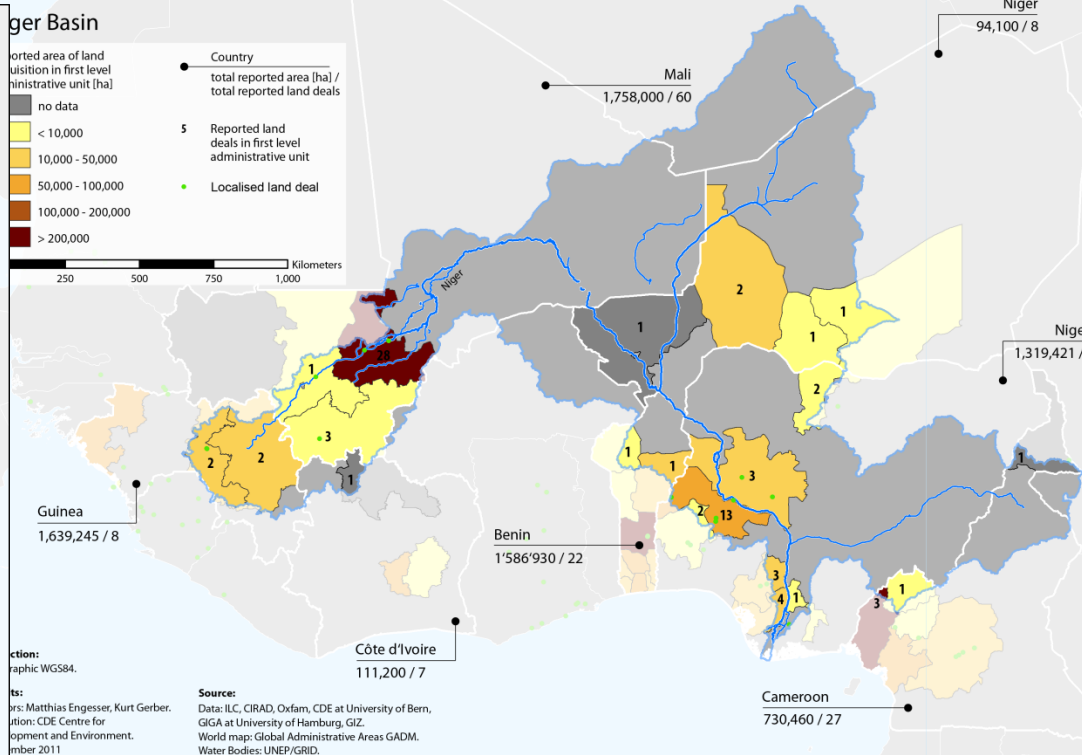


... as well as according to NR, infrastructure, ...

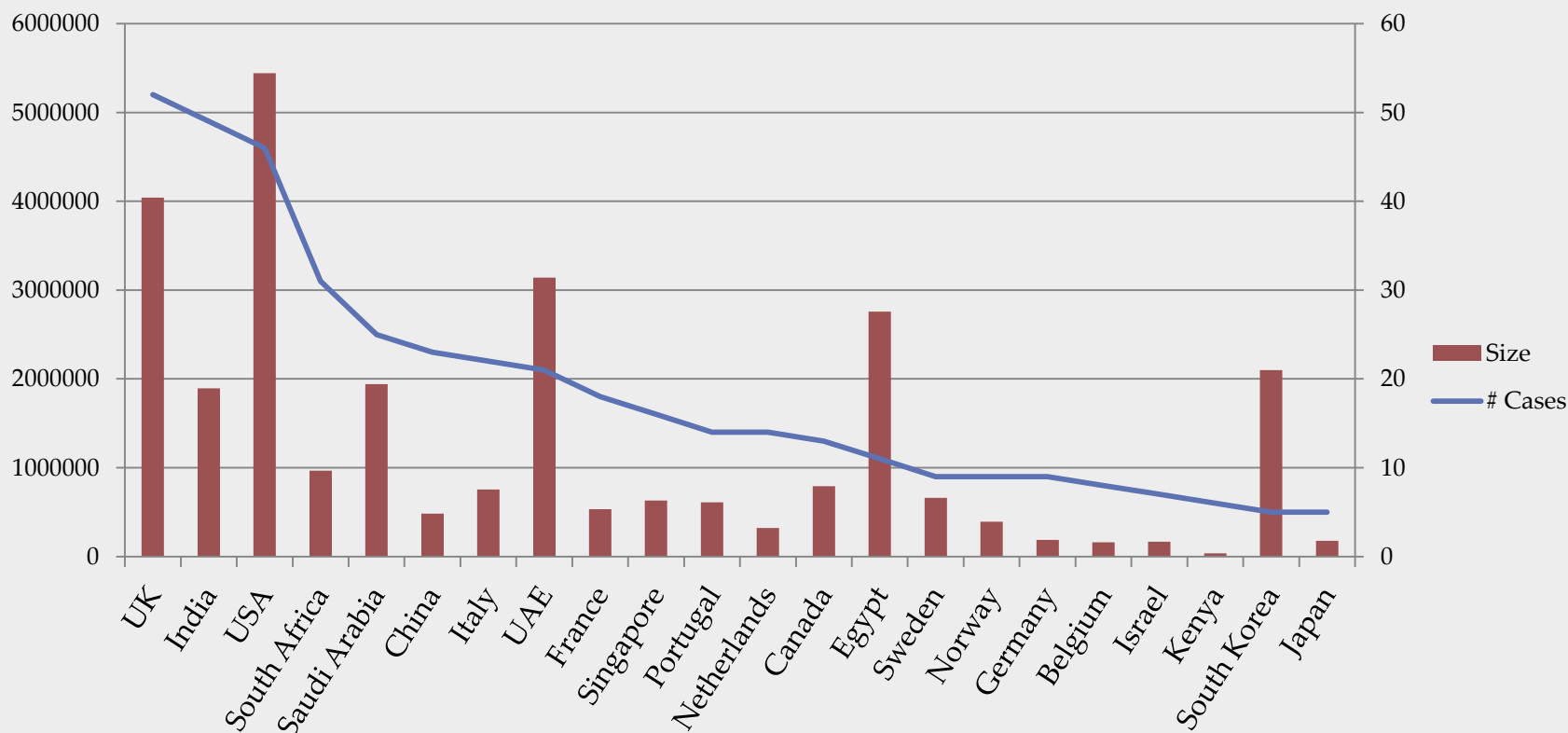
Commercial Pressure on Land Nile Basin



Commercial Pressure on Land Niger Basin

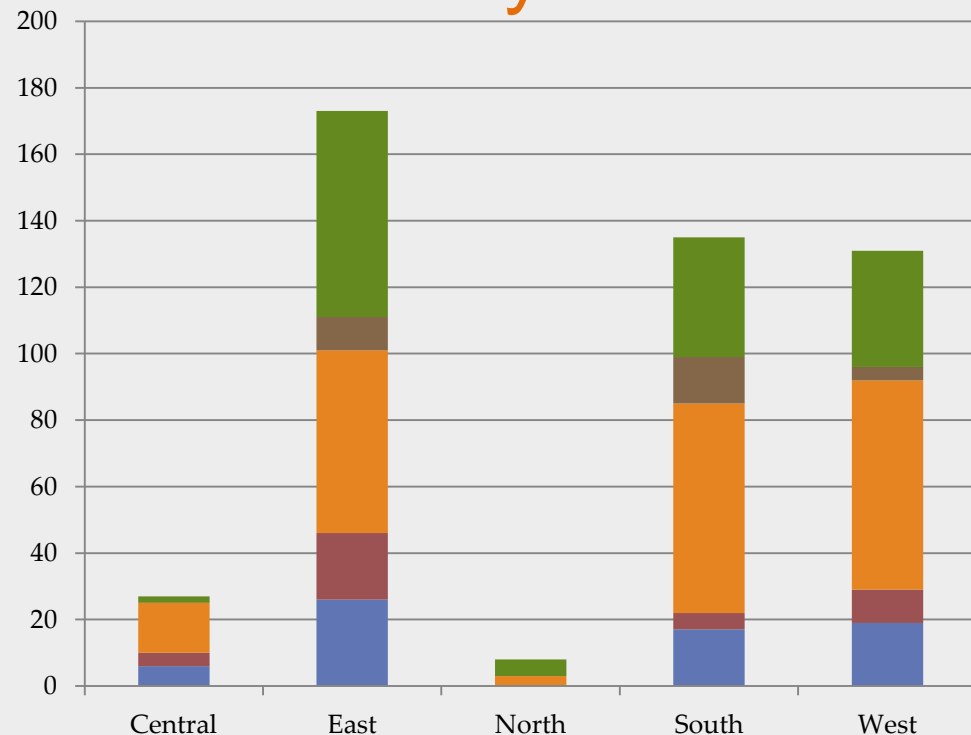


Investor countries in Africa



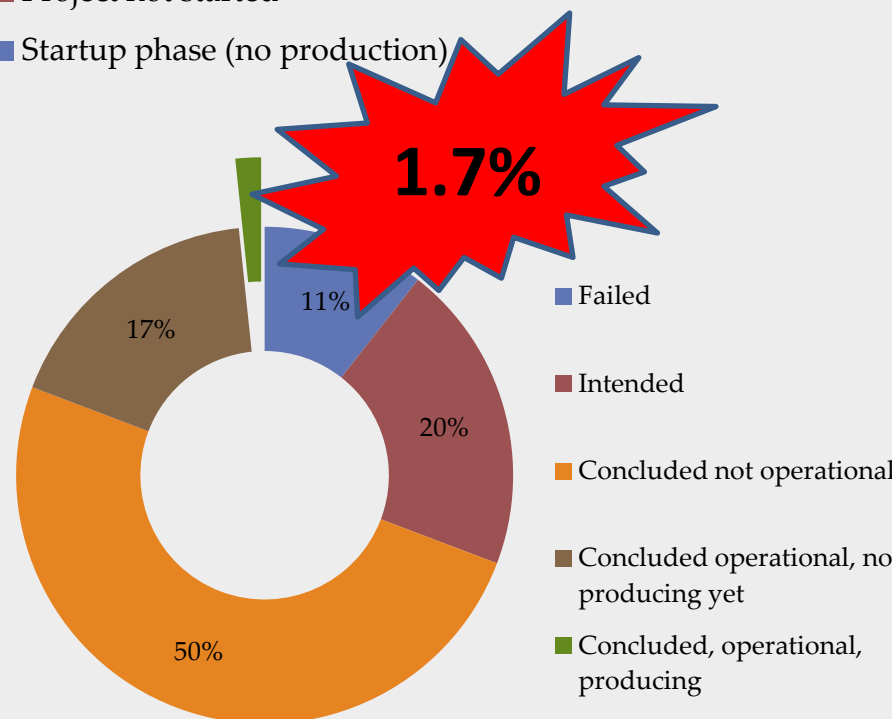
North	West	Central	East	Southern
Saudi Arabia	UK	USA	Egypt	South Korea
UAE	India	Malaysia	UAE	South Africa
South Africa	Italy	Canada	USA	UK
Japan	Liberia	Singapore	Jordan	Brazil
-	France	Belgium	Saudi Arabia	India

Very little effective production



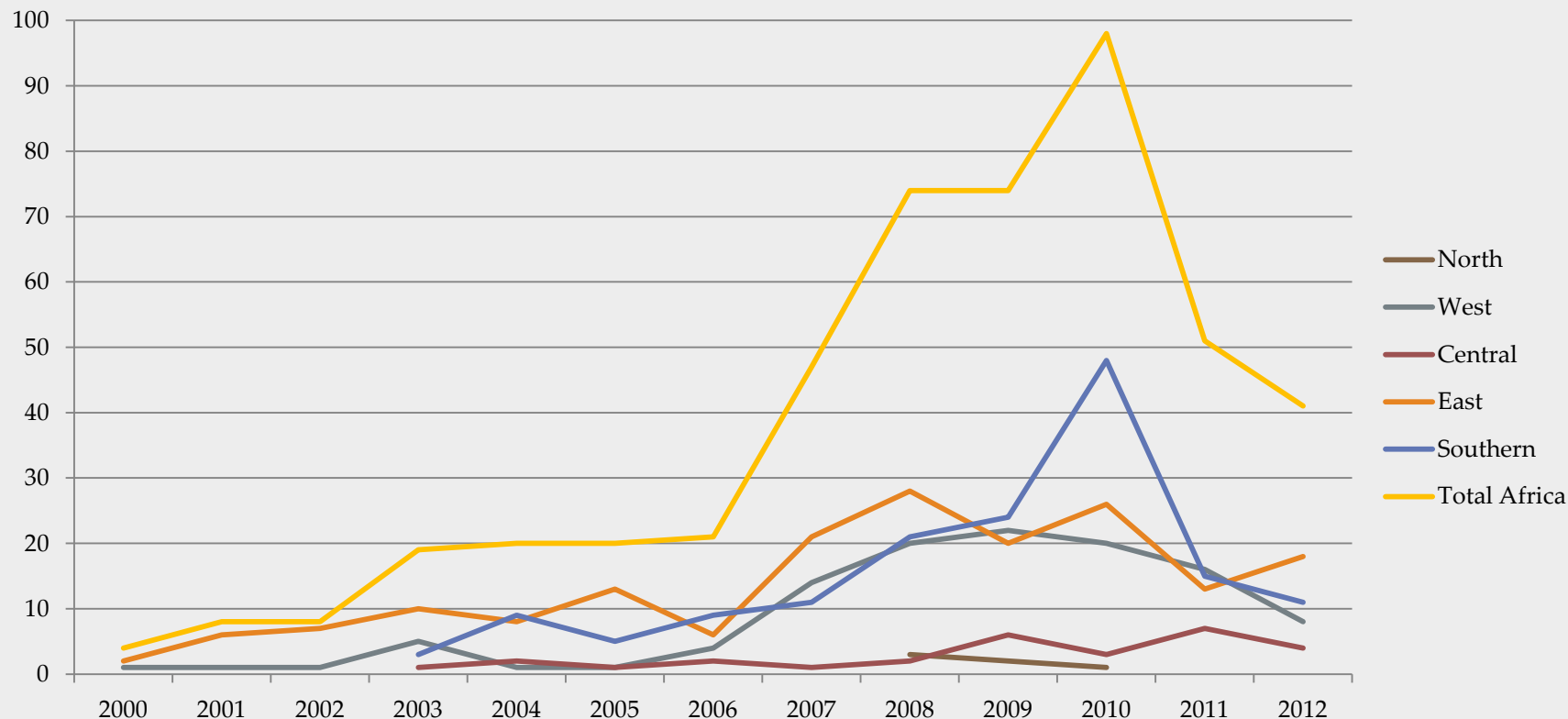
AFRICA

- Unknown
- Project abandoned
- In operation (production)
- Project not started
- Startup phase (no production)





Towards a normalisation ...?



Reasons: Credit crunch, high failures, less media focus, civil awareness, countries are getting better prepared



LSLA globally

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Different LSLBI with different outcomes

Independent farmer model	Associative farmer model	Cooperative farmer model	Speculative 1000-day model	Asset management and Investment funds model	Nucleus estate model	Agribusiness Estate model



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High failures

- *Uncertain institutional environments and the difficulty of doing business*
- *Technicality of the projects*
- *The lack of markets*
- *Lack of financial services*
- *High settling and transaction costs*



New strategies 1

Independent farmer model	Associative farmer model	Cooperative farmer model	Speculative 1000-day model	Asset management and Investment funds model	Nucleus estate model	Agribusiness Estate model
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High failures

Increased integration

Few inclusive models

- *To overcome high risks related to settlement in less developed agrarian economies*
- *Focus on core business*



New strategies 2

Independent farmer model	Associative farmer model	Cooperative farmer model	Speculative 1000-day model	Asset management and Investment funds model	Nucleus estate model	Agribusiness Estate model
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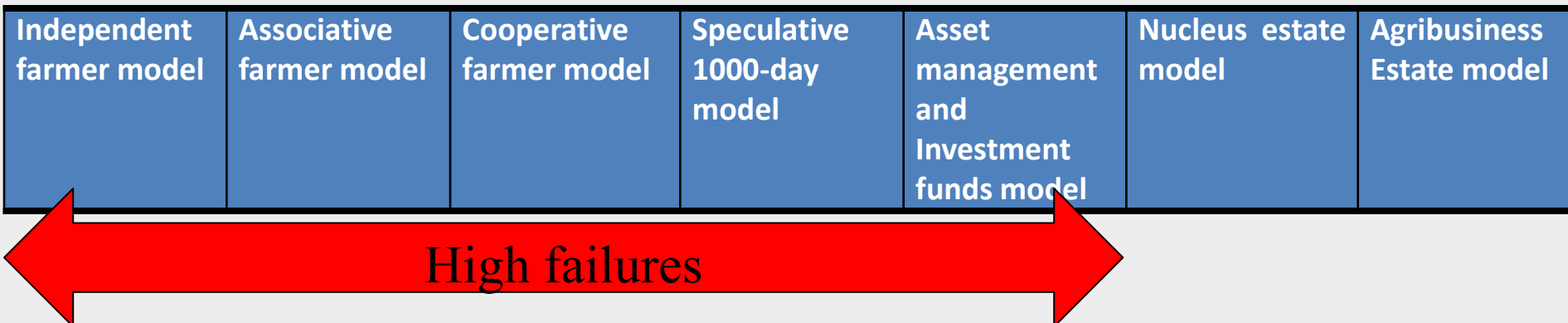
High failures

Less risky activities

- Increased focus on stable countries, with well-developed property rights
- Other investment strategies (equity)

Less visible but at least as important in terms of volume and impact on agrarian structures in host countries

New strategies 3



A more organised second generation of investments

- Going beyond individual settlements
- More coherent/structured support
 - Private sector (service providers, ...)
 - Governments (one stop shops, ...)
 - International community (VGs, RAIs, F&Gs)
- Broader agricultural environments are developing



Some thoughts

- Agrarian change ... slow, partial, tipping point?
- Lack of LT reflection on development trajectories



Land Matrix - Challenges

- DATA
 - Data availability and reliability
 - Dynamic (status of deals)
 - Specificities of countries/deals
 - Processes
- POLICY
 - Policy debate
 - National jurisdictions
 - Transparency / accountability



Need/necessity to decentralise



PHASE 2 - PROMOTING OPEN GOVERNANCE

- Open data: Making the data visible and understandable
- Transparency in decision-making over land and investment, as a step towards greater accountability
- Feeding the policy debate and public participation in building a constantly evolving database on large-scale land deals

Launched in April 2013 ... on-going



TOWARDS OPEN SOURCE & GOVERNANCE...

- Decentralisation
 - Twin goals:
 - Improving the quality, dynamics, and “automatic generation” of data
 - Involving stakeholders in the dialogue and decision-making processes through active participation
-  Ownership, participation, inclusion
- Sourcing:
 - Network of stakeholders/informants
 - Establishment of Land Observatories that concentrate on a specific area of interest (geographical/Thematic)

Land Matrix Initiative

Land Observatories

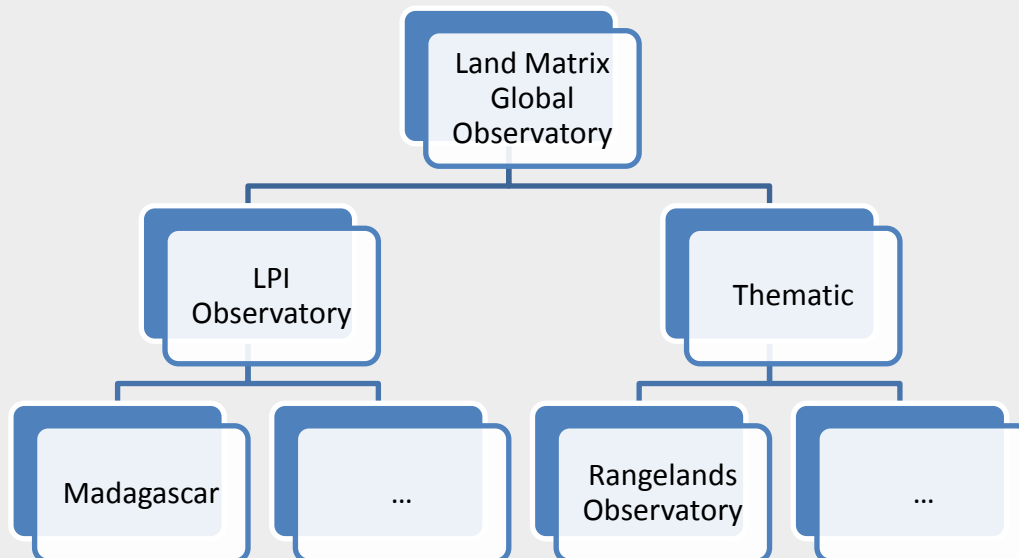
- Each Observatory – Independent, managed by own interest group
- Based on multi-stakeholder platforms

Software

- Adapted to local needs

Land Matrix Global Observatory

- LM partnership provides development support, linking to the global database

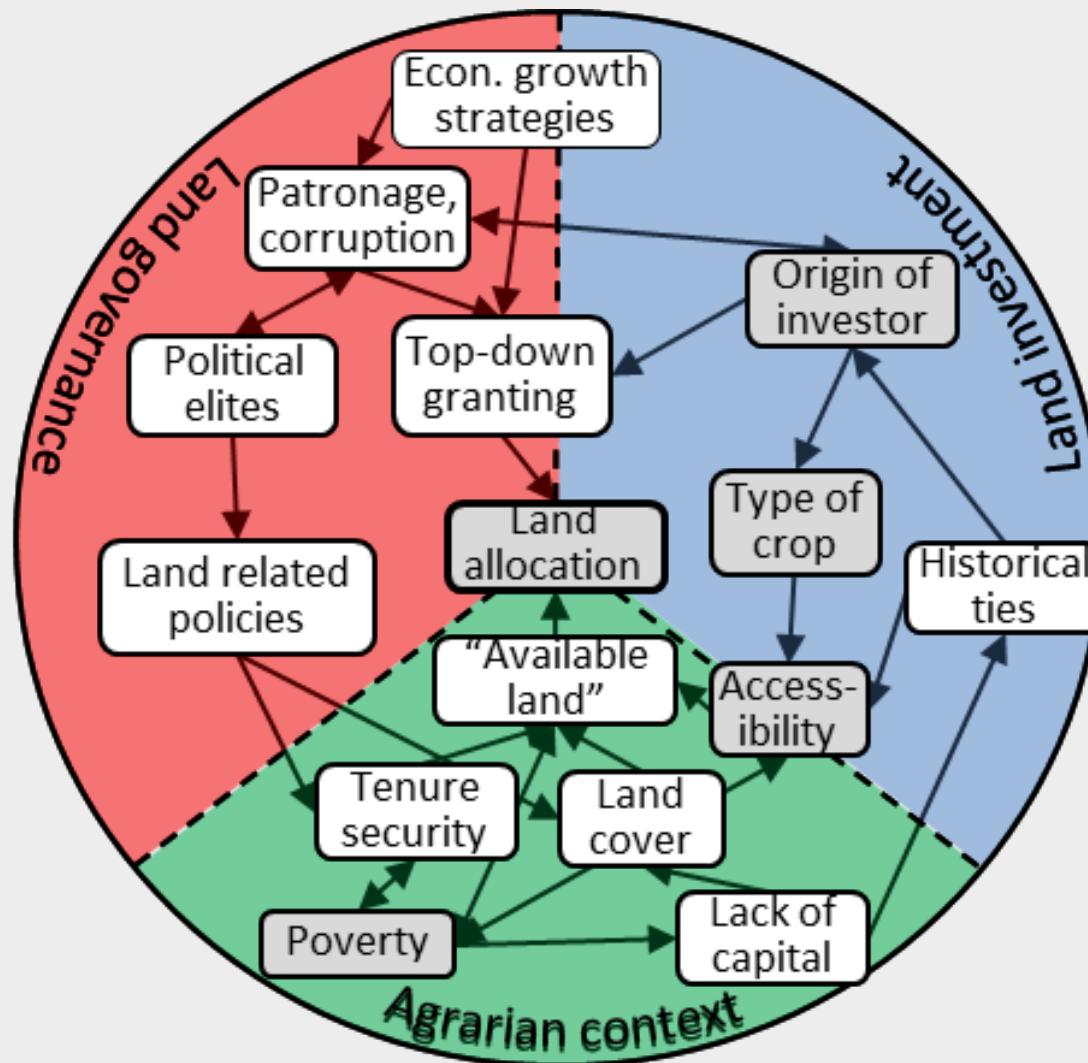




Context matters for LSLAs

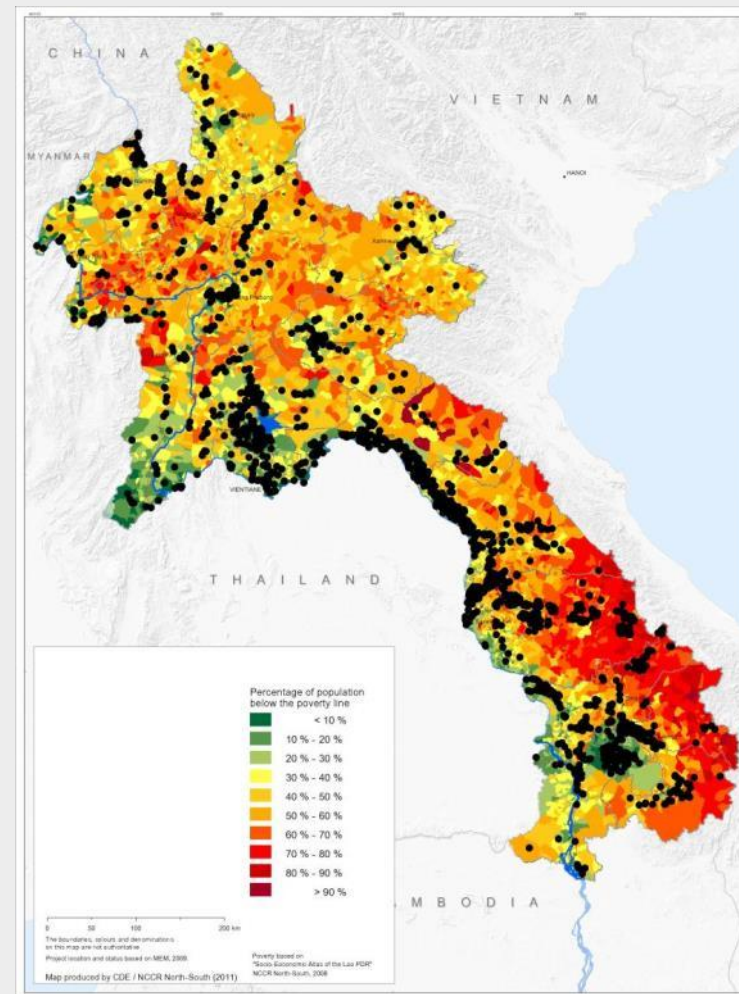
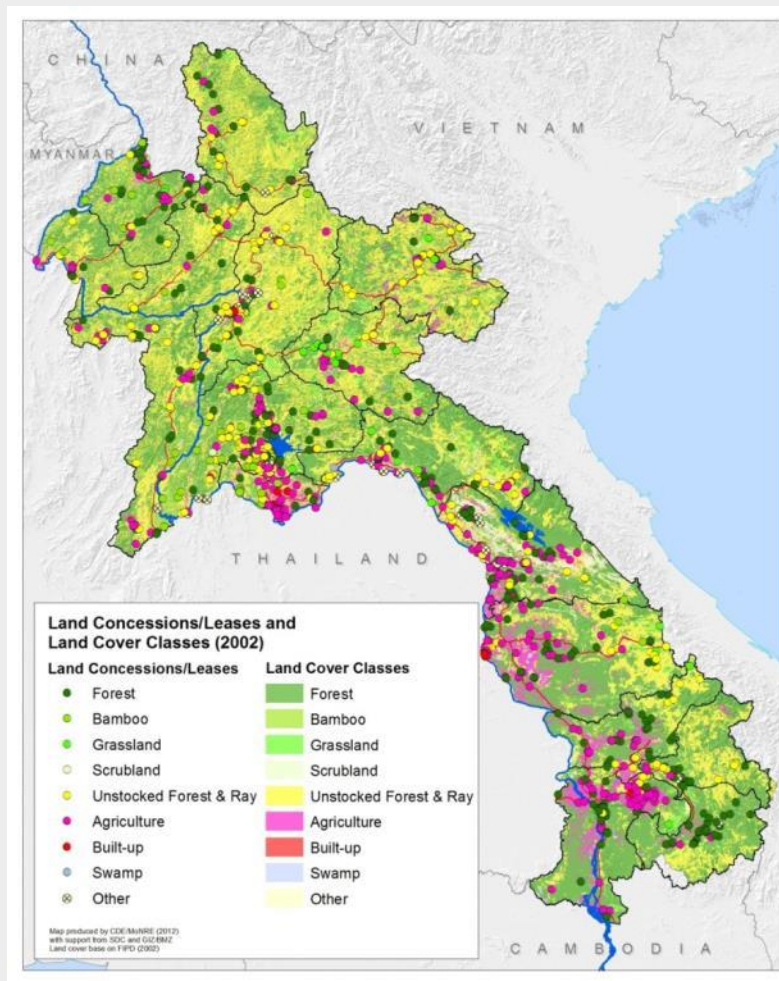


Context matters for land deals



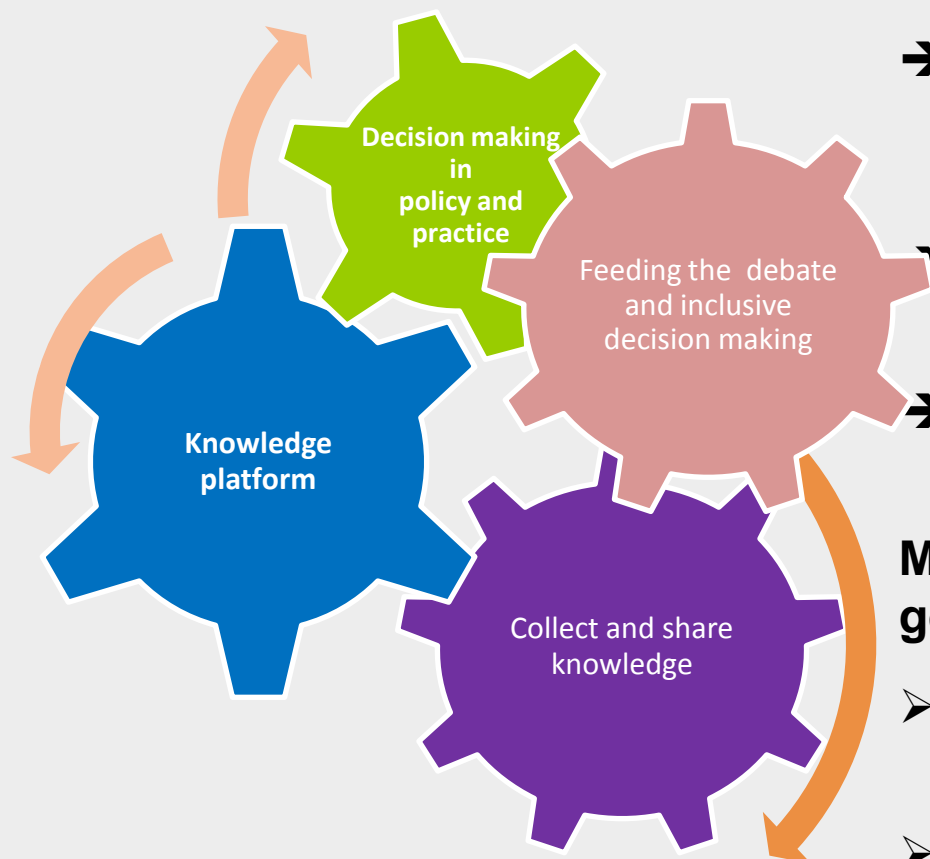


Context matters for LSLAs





Towards ...



Contextualising land deals

- ➔ From static data on land deals to in-depth information on processes, types of flows, ...
- ➔ Establishing links between flows, actors, and places
- ➔ Focusing on competing claims, trade-offs, equity

More effective and inclusive land governance

- Ex of linking technical and social innovation
- Socio-political conditions determine involvement of actors
- National ownership vs. cross-scale connectedness



<http://www.landmatrix.org>

